



user manual

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patentGate User manual
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User manual

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1. Preface

1.1. Introduction

patentGate is a modular structured, user-specific customizable, platform independent, web-based client-server-application program for administration of patent data in industrial businesses.

patentGate supports the enquiry in patent archives and because of extensive functions for editing and administration ("work-flow"-components) it's possible to realize the comfortable arrangement of the patent data between the patent department and the construction- and development departments of business companies.

patentGate allows user access as well as the administration of the patent data. This is realized with user-specific userrole.

Because different users have varying requirements in the process of patent monitoring, patentGate gives every user just the functions he needs.

patentGate uses the following user roles:

Administration:	Administration, edit descriptors, users and groups
Patent department:	Generate queries and profiles, Monitoring, modify bibliographic data
Distributor:	Run queries, Work with circulars and delegate documents to viewers, save queries and search results
Viewer:	Run queries, Work with circulars, save queries and search results
Guest:	Run queries in simple search mode, save queries and results

Administrators manage user access to patentGate, import data, configure the system and develop the descriptor system. They can search, save queries and results and access monitorings and circulars.

The main aspect for the **Patent department** is monitoring. New documents considered relevant are delegated to distributors and viewers to obtain return information. This is done paperless, all information is saved in the database and can be displayed in patentGate.

Distributors are similar to viewers, but they have the possibility to delegate documents to viewers. The **Viewers** are the recipients of the circular. They send their feedback about the documents to the patent department.

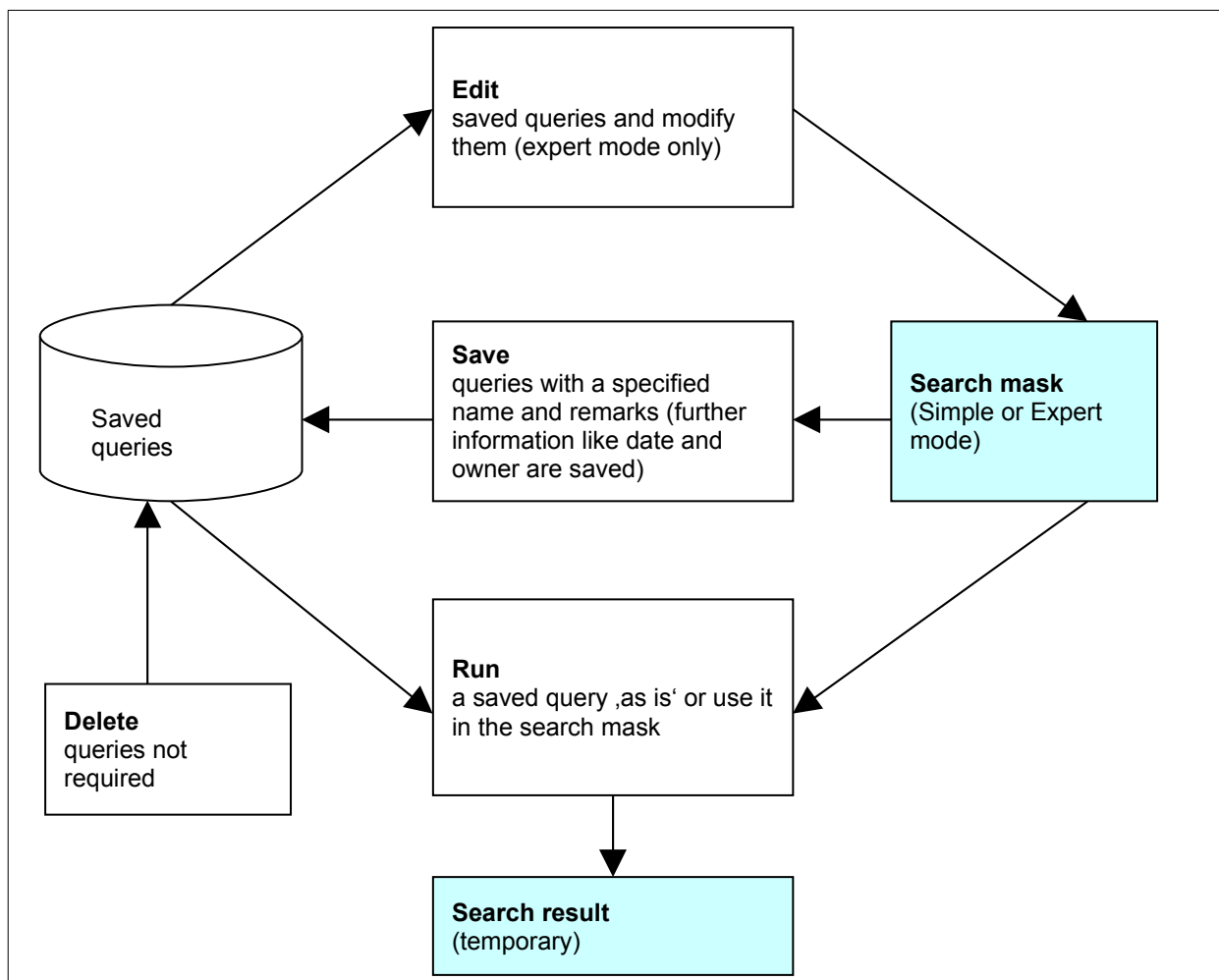
Everyone can become a patentGate **Guest** user. It is possible to search and save own queries and results. Participation in circular is not included. Please contact your patent department for further details.

All users can search in simple search mode and save queries and results. The expert mode is available for all except guest users.

1.2. The workflow in patentGate

The following pages show the areas of patent work covered by patentGate.

Search documents



There are two search masks: Simple search and Expert mode. Queries are on a per field base and Boolean operators can be used.

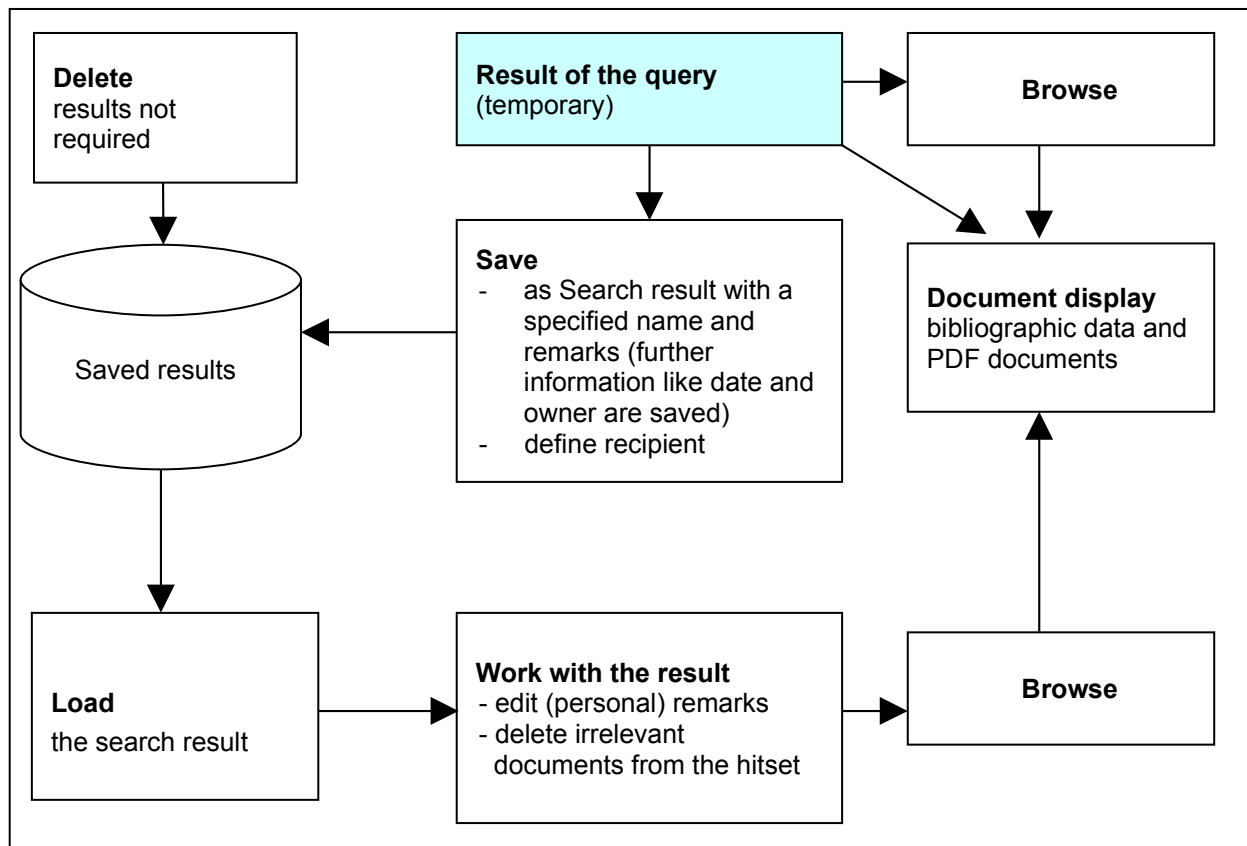
Should the database be monitored regularly (for companies or technical fields) there are two possibilities: save the query or save the result.

If the query is saved, it can be run in the complete database, the last update or a specified range of imports. patentGate has an auto profile function. With this all new documents for a specified query are searched and saved as a result when new data is imported to the system.

When saving a search result a snapshot of the actual system is made. After the next update the database must be searched again.

Queries and results can be deleted if they are not required anymore.

Saved results



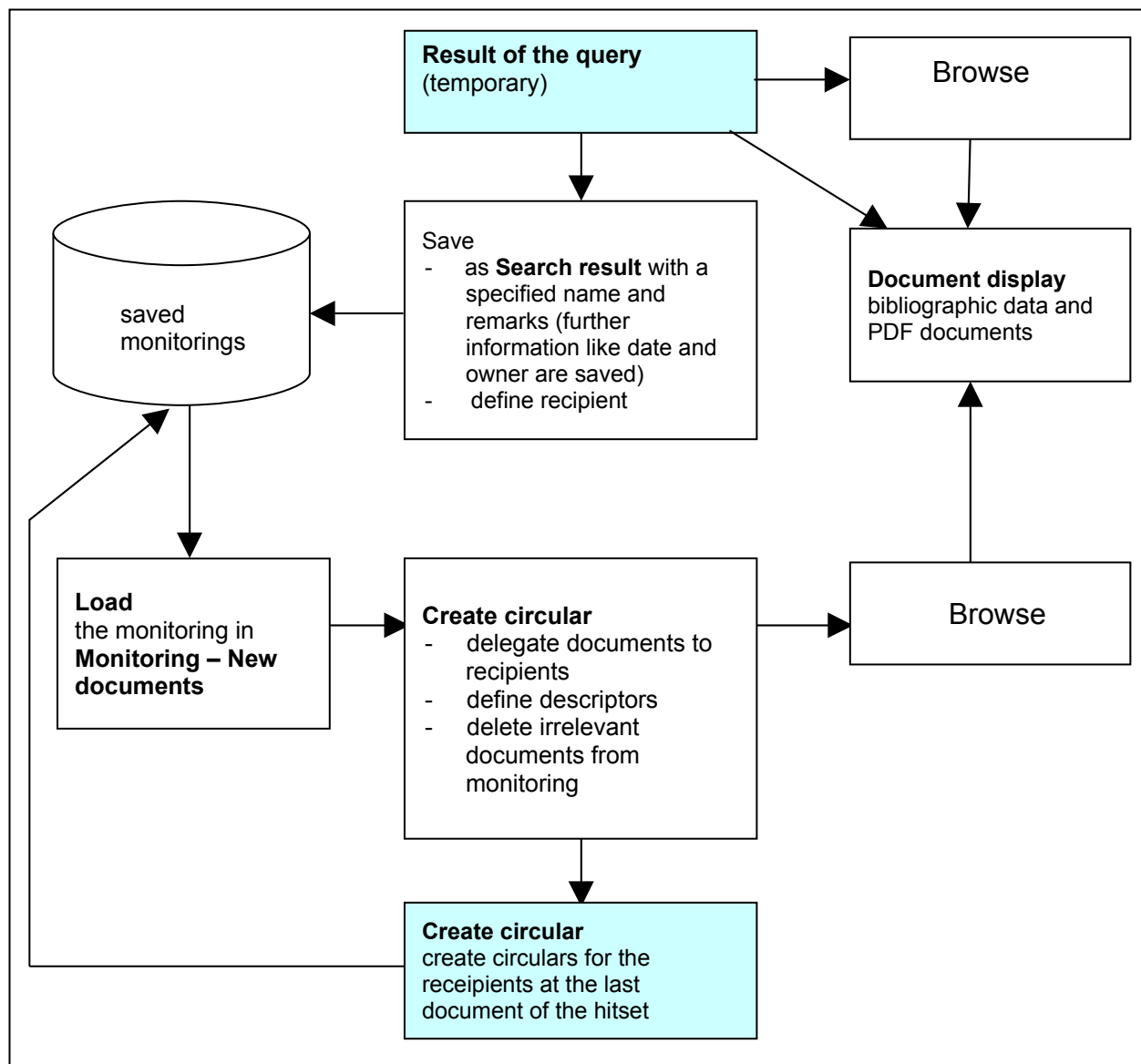
To work with temporary search results they must be saved. In the result set not the complete record is saved but a reference to the bibliographic data.

Search results can be saved as „Search result“ or „Monitoring – New documents“. They are personal result sets of the current user.

The result set has a name and an optional remark which are displayed in the summary. The owner can add personal remarks to the result set and delete irrelevant documents from it.

If a search result is deleted, the result set is removed from the database.

Monitoring



To monitor documents and delegate them to circular the temporary search result is saved as „Monitoring – New documents“.

Every member of the patent department and distributors can define up to 20 recipients for his personal circular in „Administration – Recipients“.

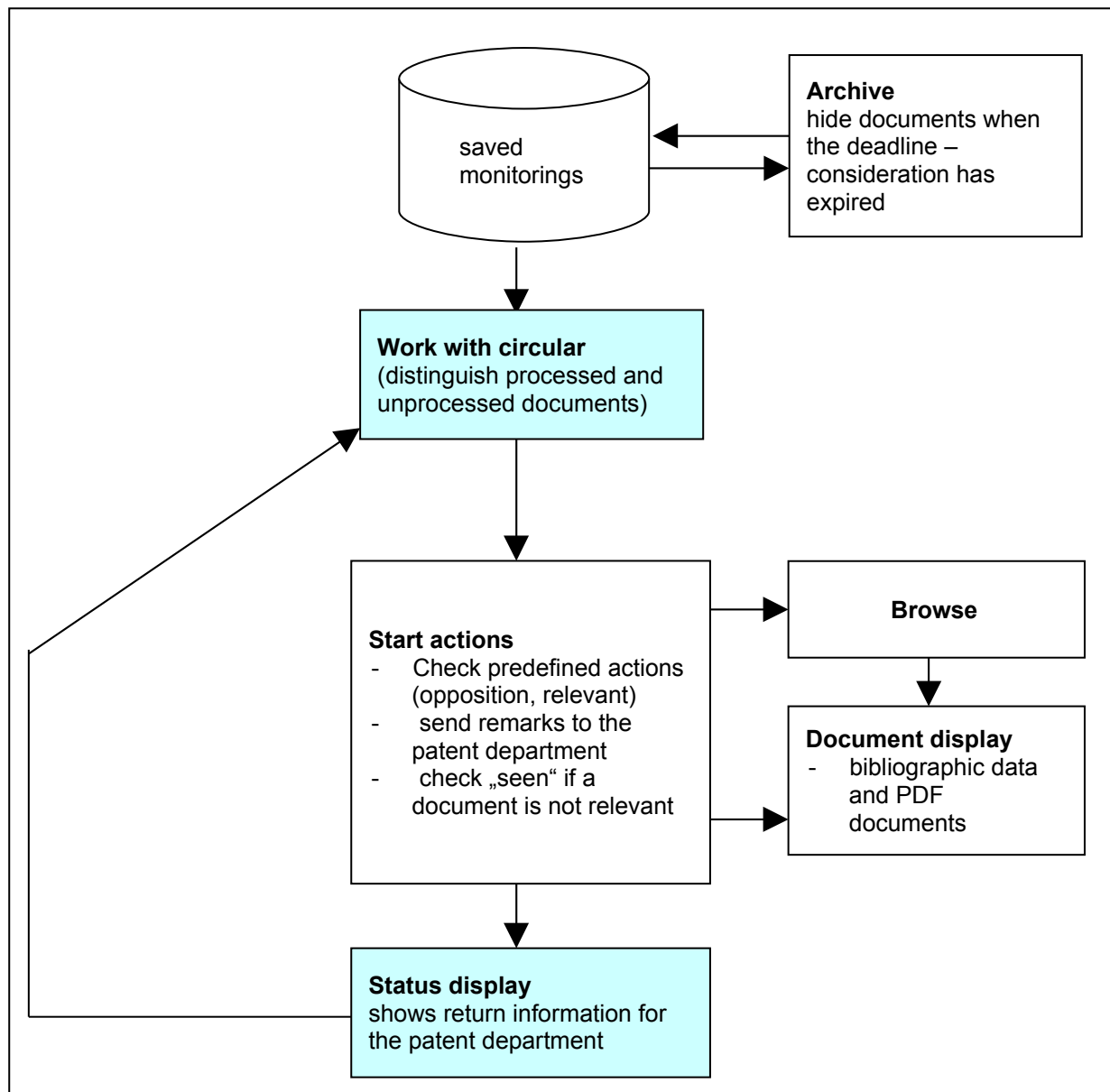
Is a monitoring selected, the login names of the distributors/viewers or the group names are displayed at the end of each document and can be checked with check boxes to delegate them to the specified recipient. Documents that are not considered relevant can be deleted from the result set of the monitoring and marked as deleted in the bibliographic data. To prevent deleting of a document considered relevant by another user, this mark is reset if another user marks it “not to delete”.

At the last document the circulars can be created. If the recipient logs in the system, all documents checked for him are displayed in „Circular“ and an event is generated that sends an e-mail to the user.

After the deadline for consideration the patent documents are archived.



Work with circular



Viewers and distributors work with the circular. The functionality is quite similar to a paper circular. When the user logs in all documents in the circular where displayed – differed in „Processed documents“ and „Documents to treat“. At every document predefined actions can be checked: Opposition/Conflict, Relevant or Seen.

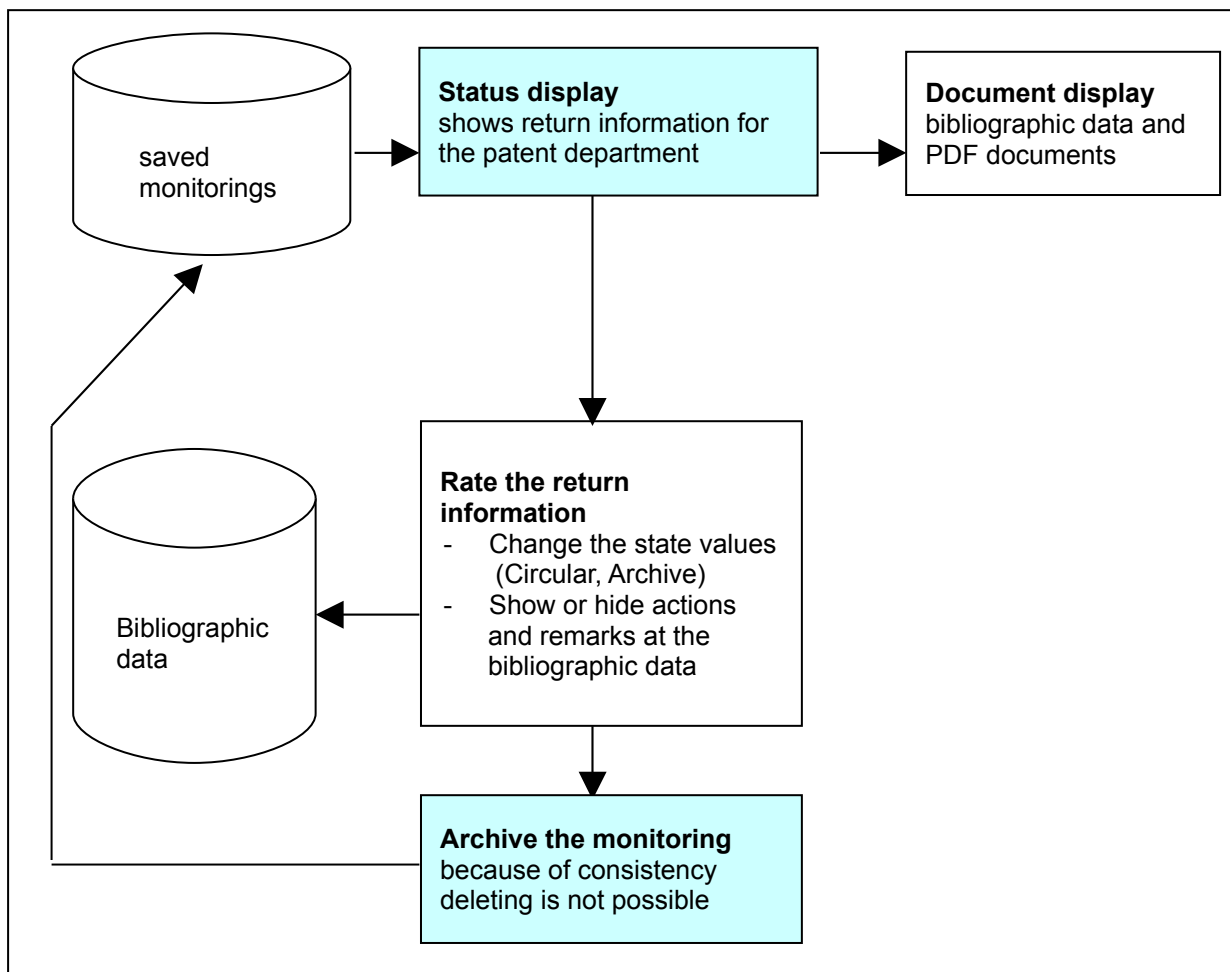
Distributors have the additional possibility to delegate documents to further recipients. Nevertheless they must at least mark the documents as “seen”.

All documents marked „Opposition/Conflict“ or „Relevant“ are displayed when the sender of the circular logs in. A remark is mandatory.

At quitting the document display, the number of the edited or non-edited documents is updated.

Processed documents are removed from the baskets if the deadline for consideration has been reached.

Return information from the monitoring



The Status display is to collect the return information from the circulars. Documents with feedback and return information from participants of the circular are displayed. Documents marked as „Seen“ are not displayed in this view.

If the patent department defines actions and remarks at the document, this information can be made visible „for all users“. If not, only members of the patent department see the information.

The view „Monitoring – distributed documents“ shows all monitorings with their deadline for consideration. Is this deadline expired and all return information is answered, the monitoring can be archived. Documents from hidden monitorings are not displayed in „Status – current/elapsed“, but can be viewed as archived monitoring.

To show ratings in the documents as history function, it is not possible to delete a distributed monitoring.

Handling

To facilitate the handling with **patentGate** we allocated this brief description with workshops and the help function.

All actions are performed with mouse and keyboard Default windows options (Open file etc.) are not explained in this documentation. The browser functions can be used as usual.

Symbols at the top of the chapters show for which user role the functions are available (see symbols in chapter 1.1).

Screen

The screen is separated in two frames:

Navigation:	left: navigation menu right: content
Working with patents:	The screen layout changes to left: short display with actions right: bibliographic data / PDF display

Bibliographic data and PDF documents are opened in new windows by default.

Buttons change colour when the mouse moves over them.

1.3. Hardware and software requirements

Client	WWW-Browser with JavaScript (recommended: Internet Explorer from Version 6) and Acrobat Reader (recommended: from Version 7)
Server	OS (Windows, LINUX, Solaris) Database (MySQL, Oracle)

1.4. Information and Service

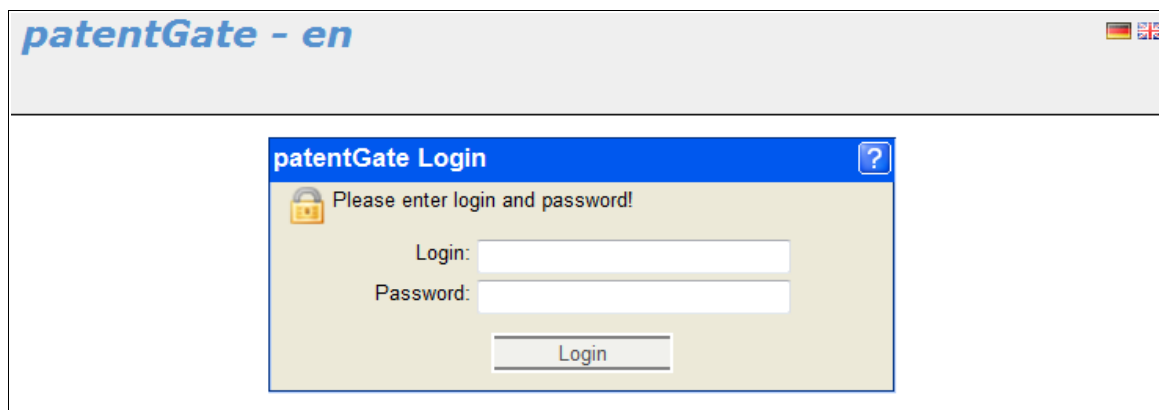
Should you require further information not covered in this manual, please contact

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2. Starting patentGate



patentGate is a multi user system. Each user has to log in to work with the system. If you use patentGate for the first time all user data are generated automatically.

patentGate uses different user role (Administrator, Patent Department, Distributor, Viewer and Guest). Each of them has its own main menu. The assignment to user roles is done by the patent department.

Furthermore, every interested person can log in as a guest user. Please contact your **Patent department** if you wish to obtain a login.

Start the application in the web browser (recommended: Internet Explorer from Version 6).

Client

<http://servername/pg/>

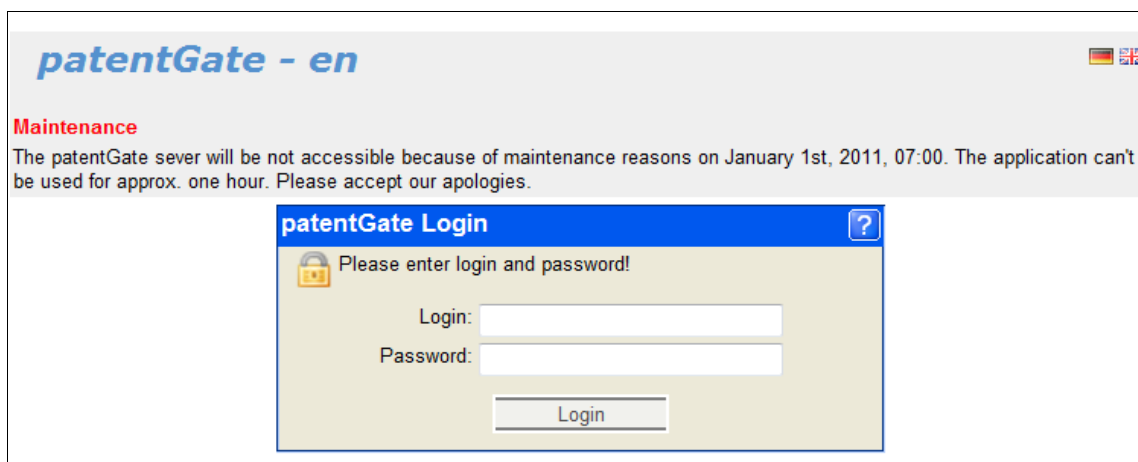
After starting the program the login window appears.

Login with user name in the input field **Login**

Enter **Password**

Click „**Login**“ or push the **Enter** key

After the Login a welcome-page is displayed.



Users of the Patent Department see the list of all relevant documents from their monitoring when they log in.

P

Monitoring		
Important feedback:	0	show
Current feedback:	0	show
Expired feedback:	0	show

If a Distributor or Viewer logs in to **patentGate**, the list of documents in circular is displayed.



New documents	
Publications to treat	0 document(s)
All grants to treat after expiry of deadline	0 document(s)
All grants to treat	0 document(s)
All applications to treat	0 document(s)

2.1. Navigation

After login the navigation menu is displayed in the left frame. It shows all available functions for the specified role.

A Administration	P Patent Department	V Viewer/Distributor	G Guest
patentGate ► User: admin ▣ Users ► User administration ► Groups ► Descriptors ► Role configuration ▣ Administration ► System configuration ► eMail configuration ► System maintenance ► DB structure check ▣ Data import ► Import data ► Auto profile ► Alerts ► My alerts ▣ Search ► Simple search ► Expert search ► Number search ► Search results ► Queries ► Filter queries ▣ Monitoring ► Delegated circulars ► Reports ▣ User ► Settings ► Log off	patentGate ► User: Patent department ▣ Users ► Groups ► Recipients ▣ Data import ► My alerts ▣ Search ► Simple search ► Expert search ► Number search ► Search results ► Queries ▣ Monitoring ► New documents ► Distributed documents ► Current feedback ► Expired feedback ► Hidden feedback ► Archive ► Important documents ► Status for other users ▣ User ► Settings ► Log off	patentGate ► User: Distributor ▣ Users ► Groups ► Recipients ▣ Search ► Simple search ► Expert search ► Number search ► Search results ► Queries ► Filter queries ▣ Circular ► Documents to process 0 ► Documents (filter view) ► Archive ▣ User ► Settings ► Log off	patentGate ► User: guest ▣ Search ► Simple search ▣ User ► Log off

3. Search

Searching is done without saving the results. Should search results be archived and processed, they must be saved. The saved search results are a record set valid at the time of search.

For the regular observation of a technology area it is recommended to store the search query and run it regularly - either in the entire database or only in the current delivery.

Each user can enter (private) remarks in his saved results. They are saved and displayed with the search result and can not be searched. Is the saved result deleted, the remarks are deleted too.

3.1. Simple search



Search mask

Simple search

Country + Patent number + Type:

?

Title:

?

Applicant:

?

Inventor:

?

Abstract:

?

IPC Main

?

All IPC-Classes:

?

Publication date:

?

Application date:

?

Notice:

?

Profile

?

Internal number:

?

Descriptor:

+

?

Reset form

Load

Save

Search options

Search in

All data

Number of results:

10

hits / page

Sort order:

Country + Patent number

Count

Search

The following search fields are available in simple search:

Country	Two letter country code Sample: DE
Patent number	Numeric patent number without country code (digits only without special characters) Use <, <=, >, >= to search ranges Sample: 6127749 <19912345 >1209325 and <1209333
Publication type	Sample: A1, A4
Title	Sample: motor* AND getriebe
Applicant	Sample: siemens AND nixdorf mercedes or daimler*
Inventor	Sample: presting AND hartmut
Abstract	Sample: gehaeuse* AND verbind*
IPC Main All IPC Classes	Sample: A01B001/00 OR A01B001/24
Publication date	Use <, <=, >, >= to search ranges Format: YYYYMMDD Sample: 20020815 <20000000 and >19990101
Application date	Use <, <=, >, >= to search ranges Format: YYYYMMDD Sample: 19990723 >20020101
Notice	Free text comment at the document Sample: relevant
Profile	The query profile to which the document belongs
Descriptor	Specific information about technical fields 1) Enter in text field or 2) Select from the tree displayed with 

Tip: If selecting more than one term, an OR will be applied. This can be edited.

All fields are connected with logical AND.

Search terms can be connected with the logical operators AND, OR and AND NOT. Truncation is possible with the asterisk * for zero or more characters. Parentheses are not possible.

There is no difference between small and capital letters. German „umlauts“ like „ä“ were searched as „ae“.

After every field a question mark is displayed . There additional information and a sample for this field is displayed.

Possible **options** are:

Search in:	“all data“ or „last update“.
Numer of results:	hits / page
Sort results by:	choose from the select box

In the lower range of the entry mask there are the commands

Reset form	Resets the search form
Load	Shows all saved search queries
Save	Save the search query

In the lower menu bar there are the commands

Count	Shows the number of hits
Search	Executes the search

Search Results / Simple search

After searching the window **Search result** is displayed.

 **Search result**
2000 hits, page: 1/200

Query: ti=motor* **Sort order:** cc,pn

Patent number	IPC/Descriptors	Title	Patent applicant
 DE 01016139 B1	SV05	Scheinwerfer fuer Kraftfahrzeuge, insbesondere fuer Motor raeder, mit einem schwenkbar im Scheinwerfergehaeuse angeordneten Reflektor	UNION SILS VAN DE LOO & CO
 DE 01715820 U	HF04	KENNZEICHNUNG ELEKTRISCHER SICHERUNGEN VON KRAFTFAHRZEUGEN, INSBESONDERE VON LANDWIRTSCHAFTLICH NUTZBAREN MOTOR FAHRZEUGEN.	HEINRICH LANZ AG (DE)
 DE 01797321 U1		ELEKTRISCHE MOTOR BREMSE.	APP UND ELEKTRO KLEINMOTORENBA, DE
 DE 01808521 A1		Verfahren und Einrichtung zur automatischen Betaetigung der Scheibenwischer(- Motore) bei Fahrzeugen, vornehmlich Kraftfahrzeugen	WOYRSCH GERD
 DE 01854410 U	SI01	SCHEINWERFER FUEER MOTOR FAHRZEUGE.	PHILIPS NV (NL)
 DE 01896883 U	LF01	SCHEINWERFER FUEER FAHRZEUGE, INSBESONDERE FUEER FAHR- UND MOTOR FAHRRAEDER.	UNION SILS VAN DE LOO & CO (DE)
 DE 01898311 U	LI01	Elektrische Leuchte, insbesondere fuer den Motor - bzw. Gepaeckraum von Kraftfahrzeugen.	Daimler-Benz Aktiengesellschaft, Stuttgart-Untertuerkheim
 DE 02253846 A1	H01R013/46 LF01	ANSCHLUSSBLOCK ZUM HERSTELLEN ELEKTRISCHER VERBINDUNGEN, INSBESONDERE LAMPENFASSUNGEN IN MOTOR FAHRZEUGEN	CARELLO & C SPA FAUSTO
 DE 02342610 A1	B62J039/00 SG08	ANORDNUNG EINES ZUENDSCHLOSSES BEI ZWEIRADFABRZEUGEN, INSBESONDERE MOTOR RAEDERN	BAYERISCHE MOTOREN WERKE AG
 DE 02415620 A1	F04C001/16 BD02	VORRICHTUNG AN HYDRAULISCHEN PUMPEN UND MOTOR EN DES VERDRAENGUNGSTYPUS	BERGENS MEK VERKSTED

<<<
<<
- 1 - 24 - 47 - 70 - 93 - 116 - 139 - 162 - 185 - 200 -
>>>
>>

Back
Save

The window shows the query and the number of results in the hitlist. The following information is displayed per document:



Open document view



Open PDF files

Patent number

IPC/Descriptors

Title/Patent applicant

In the lower area and in the lower menu bar there are the buttons:

<<< and >>> navigates back and forth in the hitset

1-24-47 fast navigation in the hit list (jump to the selected document)

Back returns to the search mask

Save saves the result

Save search results / Simple search

In the window **Save search result** the following data are requested

Name of search result

Comment

Type (Select box), only administration and patent department

Recipient (Select box)

Tip: Not all combinations of recipient and type are valid (a Monitoring can only be applied to users of the patent department).

In the lower menu bar there are the commands

Cancel returns to the **Search result**

Save saves the search results

Tip: Saving the search results is confirmed in the window **search results**.

Save and load query / Simple Search

The image shows a 'Simple search' dialog box. It contains several input fields: 'Country + Patent number + Type', 'Title', 'Applicant', 'Inventor', 'Abstract', 'IPC Main', 'All IPC-Classes', 'Publication dates', 'Application dates', 'Profile', 'Internal number', and 'Descriptor'. Each field has a help icon (?) to its right. At the bottom are three buttons: 'Reset form', 'Load', and 'Save'. The 'Load' button is circled in red. A 'Save as...' sub-dialog box is open over the main dialog. It has a title bar with a close button (X). Inside, it has a 'Save query' section with a 'Name:' label and a text field containing 'Bosch', and a 'Comment:' label with a large text area. At the bottom of the sub-dialog are 'Save' and 'Cancel' buttons.

To save the search query:

Click **Save**

Enter the name of the query into the text field of the dialog box

Enter a comment in the description field of the dialog box

Confirm with „Save“

A window appears with the information **Saved queries**.

To load the search query:

Click **Load**

Select the query with the radio button

Confirm with „Load“

The image shows a 'Saved queries' dialog box. It has a title bar with a help icon (?) and a close button (X). Inside, it has a section titled 'Saved queries' containing a table. The table has two columns: 'Name' and 'Info'. There is one row with 'Bosch' in the 'Name' column and 'inv=bosch' in the 'Info' column. A radio button is selected next to the 'Bosch' row. At the bottom of the dialog are 'Load' and 'Cancel' buttons.

Name	Info
☒ Bosch	inv=bosch



3.2. Expert search

Search mask

Expert search

Search history:

- Search 17.02.2011 12:15 iid=769 AND (mc=B62D* OR mc=B60K011* OR mc=B60K015*)
- Search 17.02.2011 08:30 cc=DE and pn>102008024956 and dt=A*
- Search 17.02.2011 08:30 cc=DE and pn=102008024956 and dt=A*
- Search 17.02.2011 08:19 cc=de and pa=hella

Buttons: Reset form, Load, Save

Help

Fields and operators

Fields:

- CC - Country
- PN - Patent number
- DT - Publication type
- MC - IPC main classification
- IC - IPC truncated on all levels
- PA - Applicant

Operators:

- no characters to any number of characters
- exactly 1 character

operators:

AND OR NOT = <= >= < > ()

Only _profil_ itself is not allowed - use it at the end of the query to restrict the result to the current volume!

Search options

Search in: All data

Number of results: 10 hits / page

Sort order: Country + Patent number

Buttons: Count, Search

With this mask complex search queries are possible by using the [available search fields](#):

CC	Country code
PN	Patent number
DT	Publication type
PD	Publication date (format [YYYYMMDD])
AD	Application date (format [YYYYMMDD])
AN	Application number

PRI	Priority information
TI	Title
PA	Patent applicant
IN	Inventor
MC	IPC Main Classification (Truncation necessary!)
ICS	IPC (MC + IC) in all truncated levels, e.g.. C01 C01B C01B037 C01B037/00
AB	Abstract
NT	Notice
BK	Order information
C1	Internal Classification
U1	Status value (Circular, Archive)
U2	Person in Charge – Notice
U4	an EuroPCT document is marked „EPCT“ in this field, when no publication is available for exclusion of these documents out of the search, the search query can be supplemented with ... and not (u4=epct)
REF	the WO-publication number for EuroPCTdocuments
IID	Import- ID of the data delivery

Expert search uses the operators **"AND"**, **"OR"**, **"NOT"**, **"="**, **"<="**, **">="**, **">"**, **"<"**, **"(" and ")"** to compose a query.

The token **"_profil_"** can be used at the end of a query to search only in the last update, e.g.
mc=f16k* _profil_.

This is the same as the selection "Last update" in the options **"Search in:"**, but is saved with the search query. This is useful for auto-profile searches.

Tip: Enter a query in the form *search_field=search_term* (e.g. cc=de), CC=Country and de=Germany.

If you use **"AND NOT"**, parentheses are necessary for the following search term:
cc=ep and not (dt=b1)

Truncation is possible with the asterisk * for any number of characters.

There is no difference between small and capital letters. German „umlauts“ like ä, ü, ö were searched as ae, ue, oe.

To search in expert mode

Enter your query in the search fields

or

Use the [Available search fields](#) and enter then the search term.

Use [Operators](#)

You can work with the shown [last 5 searches](#)

Possible **options** are

define **hits per page**

Sort results by:

Country + Patent number / IPC + Country + Patent number using the select box

Choice of the scope of the search in the selection box **search in**

“all data” or „last update“ or selection by **IID**.

In the lower area of the search mask there are the commands

Reset form	Resets the search mask
Load	Shows all saved queries
Save	Saves the query Enter the name of the query and an optional remark.

In the lower menu bar there are the commands

Count	Shows number of hits
Search	Starts the search; the results are displayed in the window Search results

Load queries / Expert mode

Saved search results

My search results

Name	Comment	Date	Documents	Group
		01.06.2011 10:32	2	

Context menu options:

- Result
- Edit
- Save new
- Merge with
- Shrink (family)
- Create table
- Delete

In the window **Saved search results** a saved search query can be selected from the list.

The following information is displayed for the queries:

Name	of the search query
Comment	to saved search queries filled fields of the search query
Date	(Timestamp)
Feedback to	Patent department / recipient of feedback
Results to	Recipient of circulars
Owner	Owner of the search query
Auto profile	automatical run



no auto-profile



auto-profil (search result)



auto-profil (monitoring)



auto-profil (direct distribution)

In the context-menu  there are the commands

Run direct execution of the selected search query, the search results are displayed in the window **Search results**

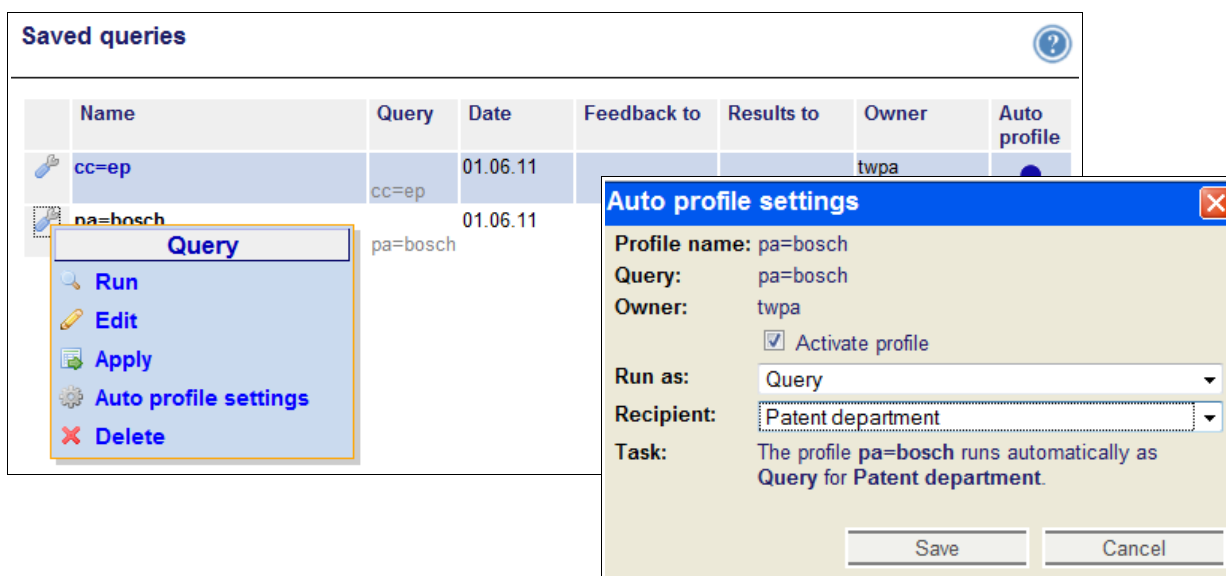
Edit Edit the search query

Apply Copy the selected query into the data fields of the window **search** (Expert Mode)

Auto profile settings Change the Auto profile settings

Delete Delete the marked Search query out of the list. Confirmation is necessary.

Auto Profil / Expert mode



The screenshot shows the 'Saved queries' window with a table of queries. A context menu is open over the 'na=bosch' query, showing options: Run, Edit, Apply, Auto profile settings, and Delete. The 'Auto profile settings' dialog box is also open, showing the configuration for the 'pa=bosch' profile.

Name	Query	Date	Feedback to	Results to	Owner	Auto profile
cc=ep	cc=ep	01.06.11			twpa	
na=bosch	pa=bosch	01.06.11				

Auto profile settings

Profile name: pa=bosch
 Query: pa=bosch
 Owner: twpa
☒ Activate profile
 Run as: Query
 Recipient: Patent department
 Task: The profile pa=bosch runs automatically as Query for Patent department.

Buttons: Save, Cancel

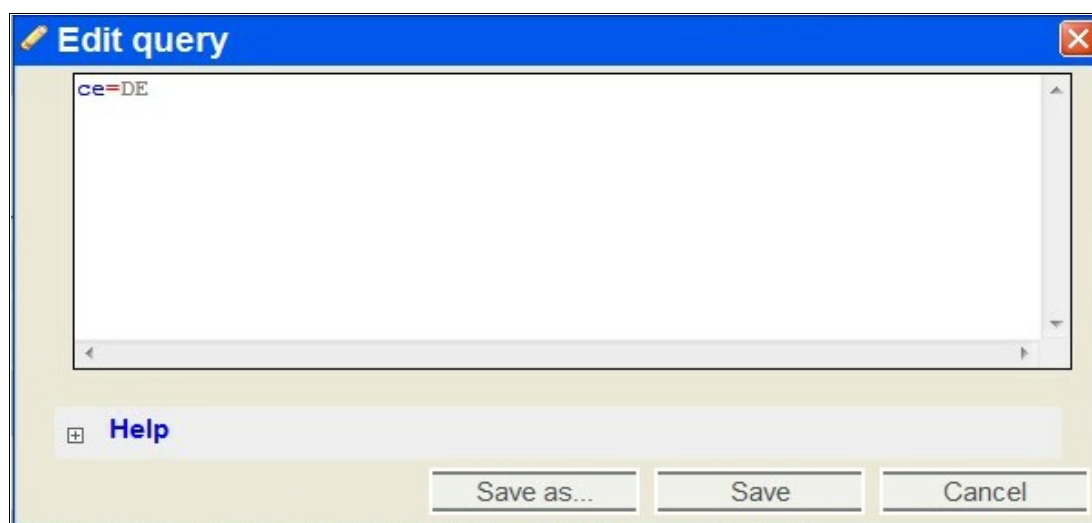
In this window queries that should automatically run are defined. Those queries are started after every data import by the administrator. For those queries it is useful to use the token "**_profil_**" to restrict the results to the last update.

The following information is displayed:

Profile Name	
Query	Text of the query
Owner	Owner of search query (Login)
Activate Profile	Checkbox
Run as	Select box [Query Monitoring Distribution]
Recipient	Select box
Distribute to	Distributor / Viewer / Group
Task	The complete task in human language

In the lower menu bar there are the commands **Save** and **Cancel**.

Edit query / Expert mode



In the window **Edit query** available search queries can be edited.

Save as

duplicates the request and saves it under a new name

Save

Saving the current request

Cancel

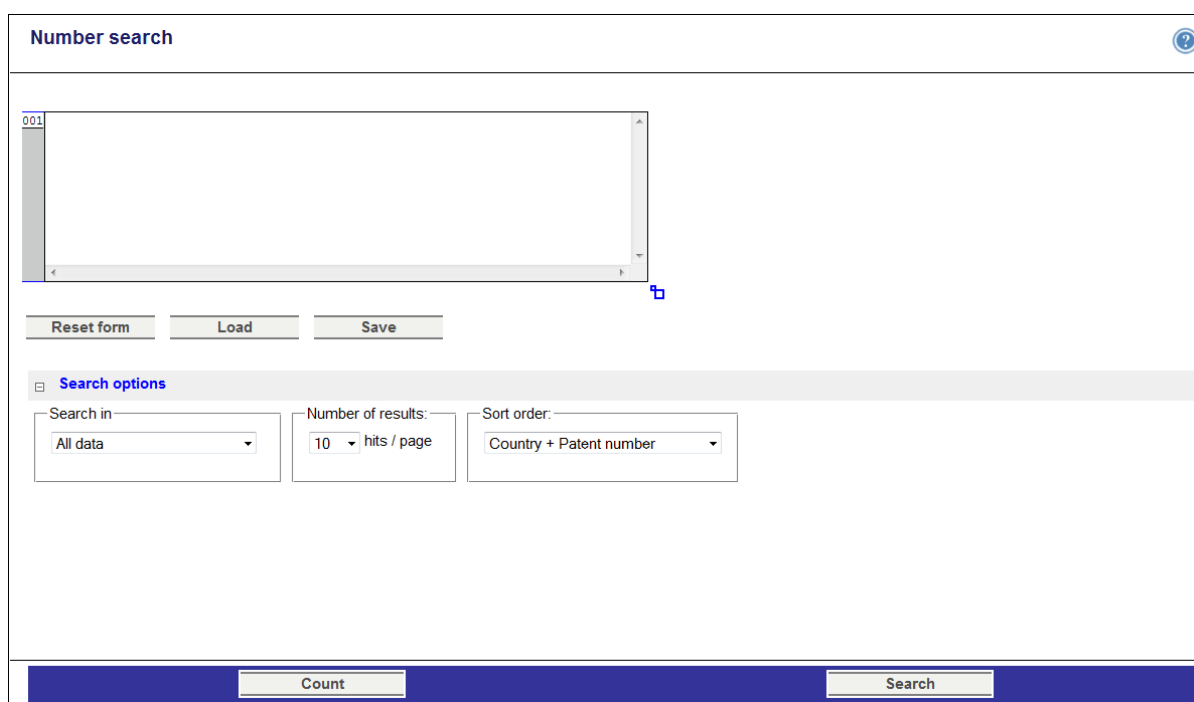
Cancel without saving

3.3. Number Search



Main menu number search

In the window **Number Search** it is possible to enter several patent numbers (one per line).



In the lower area of the search mask there are the commands

Reset form	Resets the search mask
Load	Shows all saved queries
Save	Saves the query Enter the name of the query and an optional remark.

In the lower menu bar there are the commands

Count	shows the number of hits
Search	executes the search



3.4. Search Results

Main menu

Saved search results 					
My search results					
	Name	Comment	Date	Documents	Group
	ep		21.02.2011 14:43	2000	
	german	de	21.02.2011 14:23	2000	
 Search result of group					

The window [Search results](#) shows saved search results with the following data:

Name	of the result
Comment	
Date	creation date
Documents	(Number of Documents)
Group	Search results that are assigned to a particular group

The window shows your own search results. With the  you can show or hide the **Search results of other users** and **Search results of my group**.

In the context menu  there are the commands

Edit	Edit the query
Save new	Changes Name, Comment, Type and Recipient
Merge with	Combines multiple search results into one
Shrink (Family)	Reduction of the number of hits, so that only one patent is displayed for each patent family
Create table	The search result can be displayed formatted in a table, e. g. for an export to Excel
Delete	Delete the selected search result. Confirmation is necessary.

Tip: Search results of groups can be deleted only by the owner of the search result.

Work with search results / Search result

[Edit search result](#)
Document: 1/22
[US 07722013 B2 \(25.05.2010\)](#)
[Show PDF](#)

US 07722013 B2
B66D003/08
Terex Demag GmbH, Zweibrücken, DE
Combination double bottom block

Applicant: Terex Demag GmbH, Zweibrücken, DE
Combination double bottom block

The invention relates to a combination double bottom hook block in which two pulley blocks (2, 3) each with a plurality of pulleys are connected to one another by means of a rocker (1), a load hook being mounted in a pivotable manner on the rocker. If use is made here of two lifting cables, each of these lifting cables is led over a pulley block (2, 3) and, in order to achieve the same loading capability if use is made of just one lifting cable, the latter is led, in addition, over a floating pulley (2) which is mounted between the two pulley blocks (2, 3), the two pulley blocks (2, 3) also being secured against tilting.

Descriptor:
Internal Nr.:
Claim:
Inventor: Hans-Peter Franzen, Walshausen, DE. Alfred Boes, Eschringen, DE
Publication date: 25.05.2010
IPC Main: B66D003/08
IPC Secondary:
Application information: US 11991187 24.08.2006
Priority: DE 20050906 10 2005 043 061
Family members
Profile:
Notice:
Status: Distributed to:
History:
History by family:

[Notice of this list:](#)

[Delete from search result](#)

|<<
<<<
DokNr
>>>
>>|

- 1 - 5 - 9 - 13 - 17 - 21 - 22 -

Back

[Write eMail](#)
[Close](#)

In this mode the documents will be displayed one document per page. In the left frame are the navigational elements and a short display of bibliographic data. In the right frame the full document is displayed.

In the upper area the name of the result, number of hits and the position in the hitset are displayed.

Display options:

opens the bibliographic data

opens the complete PDF document

To change/add a comment:

Enter the comment in the text field of the dialog box „**Notice of this list**“

Tip: These comments are visible only in this hit list, not on the bibliographic data. If it is the result of a group, all group members can use the comments.

In the window there are the commands

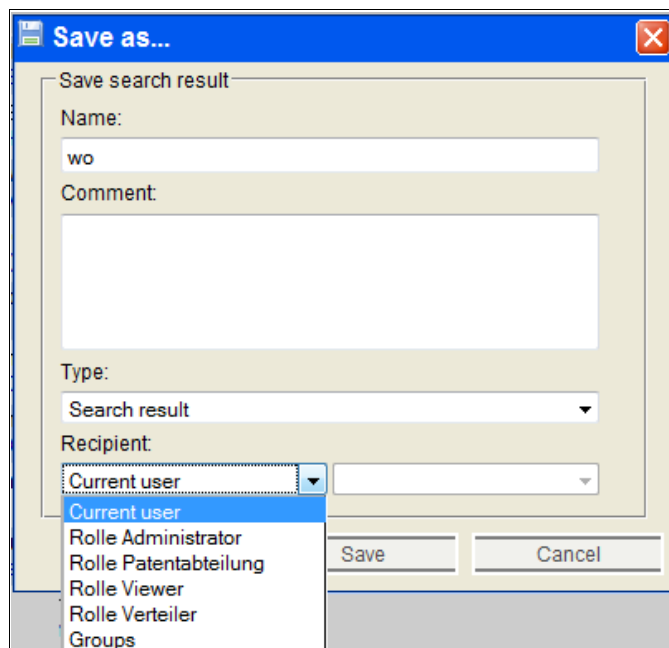
<<< and >>> navigates in the search results

1 ... Faster navigation in the search results (e.g. skip to the last document)

Back Returns to the main menu of the search results

Save new / Search result

With **Save new** name, comment, type or recipient of a search result can be changed.



In the dialog **Save search results** there can be changed

Name e. g. DE grants

Comment

Type (select box), only privilege level Administration Patent Department

Recipient Distribution to user

Tip: Not all combinations of recipient and type are allowed (Monitorings can only be assigned to users of the roles patent department).

Create a table / Search result

The search result can be formatted as a table, e.g. for export to Excel.

Table formatting

Available fields

The search result can be, for example for export to Excel, shown formatted in an table. Please select your favorite fields.

☒ Country	☒ Patent number	☒ Publication type
☐ Publication date	☐ Correction date	☐ Application date
☐ Application number	☐ Priority	☐ IPC main classification
☐ IPC side classification	☐ Title (DE)	☐ Title (EN)
☐ Title (other)	☐ Patent applicant	☐ Inventor
☐ Abstract (DE)	☐ Abstract (EN)	☐ Abstract (other)
☐ Claim (DE)	☐ Claim (EN)	☐ Claim (other)
☐ Descriptor	☐ Reference number	

☒ Formatted ☐ Invert selection

OK Cancel

By selecting any fields, you can display the data of a search result, copy it to the clipboard and use it in a spreadsheet.

Country	Publication type	Application date	IPC main classification
US	B2	20060824	B66D003/08
US	B2	20050429	B65H059/10
US	B2	20050718	B62D061/12
US	B2	20070321	E01C019/00
US	B2	20070322	B02C025/00
US	B2	20060510	B66B023/78
US	A1	20090716	B28C005/46
US	A1	20090812	B07B001/30
US	A1	20070426	B66C023/70
US	A1	20080313	B66C023/40
US	A1	20080718	B66C023/42
US	A1	20100202	B66C023/683



3.5. Filter queries

Concept

To allow customized access to the documents for distributors and viewers, the filter functionality has been developed. The default baskets [Grants to treat](#) and [Applications to treat](#) are sometimes not sufficient for a larger quantity of documents in circular.

The filters allow to divide the documents by self-selected filter criteria so that interesting documents, e.g. from the main competitor, are direct accessible.

An administrative user may define standard filters that can be imported by everyone.

In addition, each distributor and viewer can create individual filter queries.

Creat filter queries / Expert mode

To create a filter, a search query will be compiled and saved in the expert mode.

Filters are search queries in the expert mode, which are defined as [filter query](#) while saving.

In the menu "Filter queries" the order of the filter can be adapted. This has affect how the documents are grouped. Filters with the same sort order are sorted in alphabetical order.

The filter queries are processed one after another. A document is only a hit in the first matching filter. For the next filter, only those documents will be considered, which were not yet hits by those filter requests. All documents that are not matched by any filter, are displayed in the "rest-filter".

Expert search

Search 17.02.2011 12:15 id=789 AND (mc=B62D* OR mc=B60K011* OR mc=B6...

Search 17.02.2011 08:30 cc=DE and pn>102008024956 and dt=A*

Search 17.02.2011 08:30 cc=DE and pn=102008024956 and dt=A*

Search 17.02.2011 08:19 cc=de and pa=hella

Save as...

Save query

Name: Motor

Comment:

Type: query

filter query (0)

Save Cancel

Reset form Load Save

Help

Fields and operators

CC - Country
PN - Patent number
DT - Publication type
MC - IPC main classification
IC - IPC truncated on all levels
PA - Applicant

no characters to any number of characters
exactly 1 character

operators:

AND OR NOT =
<= >= < > ()
() _profil_

Only _profil_ itself is not allowed - use it at the end of the query to restrict the result to the current volume!

Search options

Search in: All data

Number of results: 10 hits / page

Sort order: Country + Patent number

Count Search

Manage filter queries / Filter query

Filter queries				
	Sort order	Name	Comment	Date
	0	alle Bosch	pa=bosch	03.03.11
	0	deutsche Erteilungen	cc=de and dt=b*	03.03.11
	0	deutsche Veroeffentlichungen	cc=de and dt=a*	03.03.11

New Import

The window is used to display the saved queries that are stored as filter queries.

Sort Order	Order of filter query in the filter chain
Name	of the filter query
Comment	Saved search query and beginning of the search syntax
Date	Timestamp of last run

In the context menu  there are the commands

Run	run the filter query
Edit	edit the query
Delete	delete the quer

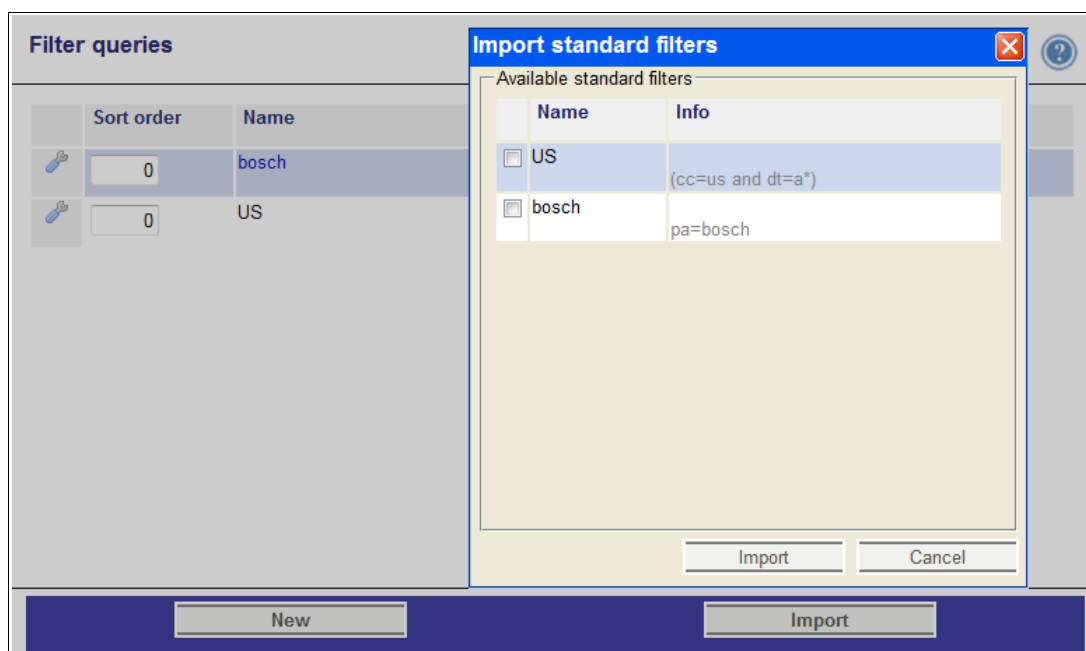
In the lower menu bar there are the commands

New	Create new filter query
Import	Imports the standard filter set

The order of the filter chain defines the priority of the filter.

The search queries are carried out consecutively by the given sort order. The next query will be applied only to the remaining documents. All documents that did not match any filter are in the „Rest“ basket.

Import standard filter



Filters defined for all users are standard filters. Those can be selected by ticking the check boxes and click **Import**.



4. Circular

4.1. Circular

Main Menu Circulars

New documents	
Publications to treat	4 document(s)
All grants to treat after expiry of deadline	0 document(s)
All grants to treat	1 document(s)
All applications to treat	3 document(s)

The window [Circular](#) shows all documents delegated to the user:

Publications to treat	All applications and grants not yet processed
All grants to treat after expiry of deadline	All granted documents (patents) delegated to the user without any action after the deadline – consideration has expired.
All grants to treat	All granted documents (patents) delegated to the user without any action before the deadline – consideration has expired.
All applications to treat	All applications (incl. German Gebrauchsmuster) delegated to the user without any action
Processed documents	All processed publications before the deadline – consideration has expired

With the icon  the selected documents are displayed.

4.2. Documents (filter view)

All documents in circular


New documents

 Documents to process 0 document(s)

☐ cc=ep 0 document(s)
☐ Rest Other documents 0 document(s)

Process

 Processed documents 0 document(s)

To allow customized access to the documents use filter queries (see chapter „Filter queries“).

Filters operate on the principle that the documents "stuck" as soon as the first filter has taken.

To display documents one or more checkboxes can be clicked. Empty filters can not be selected.

With the icon  the selected documents are displayed.

4.3. Work with the circular

In the left frame the actions to the documents are taken. The right frame shows the bibliographic data or PDF.

In the upper area the name of the circular, the number of documents and position in the hitset are displayed. The deadline for consideration and for granted patents the deadline for opposition is displayed.

Display options are



Display of bibliographic data



Display of the complete document (incl. drawings) in the PDF-format



Display the patent register information of the Publication Office

Information to the
patent department:

Sends a message to the person in charge in the patent department
(this is also shown in the history)

Every document has to be processed with click to the action fields:

Opposition
or
Conflict

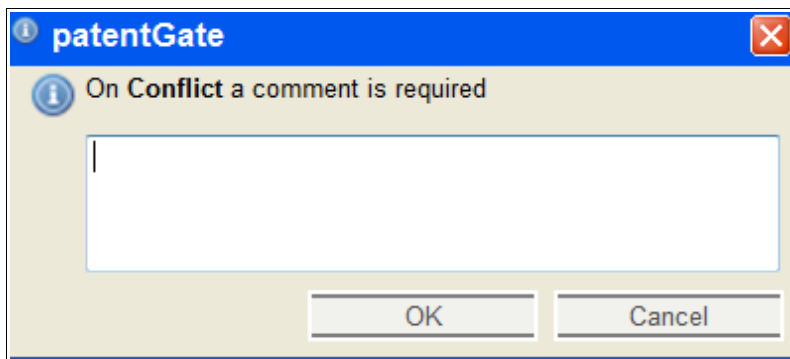
action / consultation necessary

Relevant

refers their own rights / research

Seen

no action is necessary



When clicking Relevant or Conflict (patent applications) or Opposition (granted patents) a window opens to enter a required remark has to be entered. The remarks are delegated to the member of the patent department who gave the document to the circular.

The icon  is used only to change the comment, because at "Opposition" and "Relevant" a comment is requested

In the window there are the commands

<<< and >>> navigation within the documents

1-3-5... faster navigation within the documents (e.g. skip to the last document)

Back returns to main menu "circular"

4.4. Archive

In the menu „Circular – Archive“ all processed documents, even after deadline – consideration can be viewed.

Archived documents from circular		3 documents, page: 1/1
All archived documents All archived documents All documents marked "Opposition/Conflict" All documents marked "Relevant" All documents marked "Seen"		
Document	Applicant	Status
EP 01462726 A2 F24C007/08	Geraetebundle mit beleuchtbarer Anzeigevorrichtung BSH Bosch und Siemens Hausgeraete GmbH; Carl-Wery-Strasse 34; 81739 Muenchen; DE	Conflict Last change: 31.05.2011 Comment: Conflict Consultation:
EP 01462726 A3 F24C007/08	Geraetebundle mit beleuchtbarer Anzeigevorrichtung BSH Bosch und Siemens Hausgeraete GmbH; Carl-Wery-Strasse 34; 81739 Muenchen; DE	Seen Last change: 31.05.2011 Comment: Consultation:
DE 10312724 A1 F24H009/20	Durchlauferhitzer BSH Bosch und Siemens Hausgeraete GmbH, 81739 Muenchen, DE	Relevant Last change: 31.05.2011 Comment: relevant Consultation:

The window shows the following information:

Document	document number + IPC
Title / Applicant	name and applicant of the patent
Status	feedback and remarks from the circular
<<< and >>>	navigation within the document

In the select box you have the choice between:

- All documents
- Documents marked „Opposition/Conflict“
- Documents marked „Relevant“
- Documents marked „Seen“

5. Viewing and editing documents

Bibliographic data can only be modified by users of the patent department and administrators.

Notices added to the bibliographic data are displayed for all users and are searchable.



5.1. Bibliographic data display

 **EP 02057035 B1 (21.07.2010)** 

[Show PDF](#)



Monitor for granted publications

Granted document! Deadline - opposition expires at **21.04.2011**.

Applicant: Faurecia Kunststoffe Automobilsysteme GmbH; Maria-Goeppert-Strasse 3; 85057 Ingolstadt; DE

FIXTURE FOR A HEADLIGHT UNIT, METHOD FOR THE PRODUCTION THEREOF, AND FRONT UNIT
HALTERUNG FUER EINE SCHEINWERFEREINHEIT, VERFAHREN ZUR DEREN HERSTELLUNG UND FRONTEINHEIT

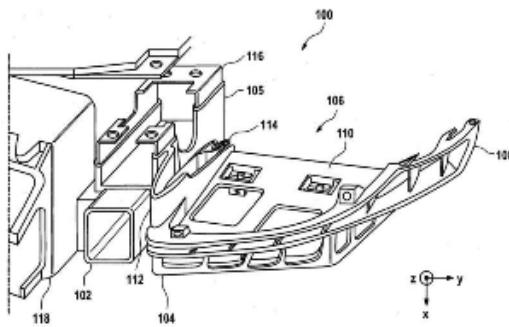


Fig. 1

HALTERUNG fuer eine Scheinwerfereinheit mit - Befestigungsmitteln (105) zur Befestigung der Halterung an einem Traegerteil (102) einer Fronteinheit eines Kraftfahrzeugs, - einem Aufnahmebereich (106) fuer die Scheinwerfereinheit, - ersten und zweiten voneinander beabstandeten elastischen Mitteln (112, 114) zwischen den Befestigungsmitteln und dem Aufnahmebereich, wobei sich der Aufnahmebereich an einer Seite der ersten und zweiten elastischen Mittel erstreckt, wobei die ersten und zweiten elastischen Mittel so ausgebildet sind, dass der Aufnahmebereich fuer die Scheinwerfereinheit zum Einbau der Halterung in ein Kraftfahrzeug im wesentlichen quer zur Fahrrichtung des Kraftfahrzeugs translatorisch verschiebbar ist, dadurch gekennzeichnet, dass die ersten und zweiten elastischen Mittel in einander entgegen gesetzten Richtungen gekrueimmt verlaufen.

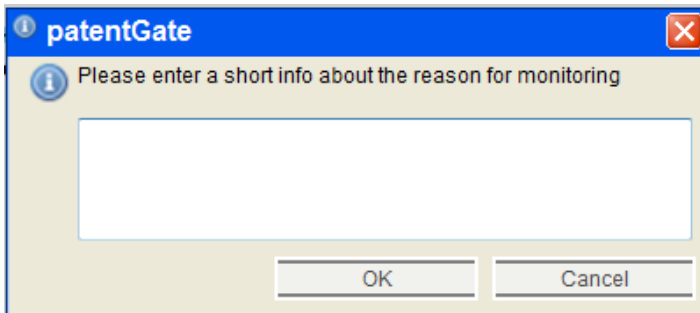
Write eMail

Edit document

Close

The window **Document display** shows the bibliographic data of the selected document. If available, a drawing is shown too.

Is the publication an german „Offenlegungsschrift“ or published European patent application (DE-A1 or EP-A1/A2), the action **Monitoring for granted publications** is available. With this the document is monitored until the granted patent is published. A remark is necessary.



Click OK and the display changes to **Document will be monitored.**

EP 01462726 A3 (02.05.2007)

[Show PDF](#)

Monitor for granted publications

Applicant: BSH Bosch und Siemens Hausgeraete GmbH; Carl-Wery-Strasse 34; 81739 Muenchen; DE
Geraetebende mit beleuchtbarer Anzeigevorrichtung

Die Erfindung betrifft eine Geraetebende mit beleuchtbarer Anzeigevorrichtung, insbesondere zur Status- und/oder Betriebsmodusanzeige eines elektrischen Geraets (2), mit wenigstens einem Leuchtmittel (10), das hinter einer zumindest teilweise transparenten und mit einer beleuchtbaren Symbolik versehen Sichtblende (4) an einer Geraetefront- oder Oberseite angeordnet ist. Es ist vorgesehen, dass zwischen Leuchtmittel (10) und Sichtblende (4) eine opake Kontrastschicht (12) aus einem transparenten Werkstoff, vorzugsweise Kunststoff, angeordnet ist, die bei nicht aktiviertem Leuchtmittel (10) hell gegen die dunklere Sichtblende (4) kontrastiert, und die bei aktiviertem Leuchtmittel (10) in dessen Farbe leuchtet.

Descriptor:
Internal Nr.:

Claim:

Inventor: Fleissner, Reinhard; Adalbert-Stifter-Strasse 17; 83352 Altenmarkt; DE. Huber, Ernst; Herzog-Otto-Strasse 31; 83308 Trostberg; DE. Meierhofer, Rudolf; Siedlerstrasse 13; 83352 Altenmarkt; DE

Publication date: 02.05.2007

IPC Main: F24C007/08

IPC Secondary: F24C015/06 H01H009/02 B32B027/28 G09F013/08 B60R011/02

Application information: EP 04003687 18.02.2004

Priority: DE 20030324 10313049

Family members [Show members \(1\)](#)

Profile:
Notice:

Status: Circular (31.05.2011)
 Distributed to: twert

History:

[Show feedback](#)

[Write eMail](#)
[Edit document](#)
[Close](#)

In the lower area of the input mask there are the commands

Write eMail	Send a link to the document via eMail
Edit document	Modify bibliographic data of the current document (sufficient privilege needed)
Close	document will be closed

The link [Show members](#) opens the INPADOC patent family information from esp@cenet.

Use to navigate within the documents.



5.2. Edit bibliographic data

Document EP 01462726 A3
Edit document

Document ?

Document: EP 01462726 A3
Publication date: 20070502
IPC Main: F24C007/08
IPC Secondary: F24C015/06 H01H009/02 B32B027/28 G09F013/08 B60R011/02
Title (DE):
Title (EN):
Title (other): Geraetebende mit beleuchtbarer Anzeigevorrichtung
Abstract (DE):
Abstract (EN):
Abstract (other): Die Erfindung betrifft eine Geraetebende mit beleuchtbarer Anzeigevorrichtung, insbesondere zur Status- und/oder Betriebsmodusanzeige eines elektrischen Geraets (2), mit wenigstens einem Leuchtmittel (10), das hinter einer zumindest teilweise transparenten und mit einer beleuchtbaren Symbolik versehenen Sichtblende (4) an einer Geraetefront- oder Oberseite angeordnet ist. Es ist vorgesehen, dass zwischen Leuchtmittel (10) und Sichtblende (4) eine opake

Reset Save Close

The window **Edit document** is to modify or add the content of the search fields.

The following commands are available

Document	returns to the original document
Reset	resets the values to the saved content
Close	document will be closed
Save	saves the changes



5.3. Display PDF documents

For each document the corresponding complete patent can be displayed as PDF document.

Click  in the hit list

or

Click on [Show PDF](#) in the bibliographic view (document display)

Close PDF documents by:

Click  in the hit list

or

Exit Adobe Acrobat, if it is not installed as a plug-in.

6. Further Options

6.1. Help



In each window a specific help text can be displayed with the question mark.

In Simple Search mode there is a blue question mark behind the search fields which display help for the selected search field.

6.2. User / Settings

In **System configuration** you can change how documents are displayed.

Document in right frame	Bibliographic data is displayed in the right frame
PDF in right frame	the PDF document is displayed in the right frame
PDF in new window	Bibliographic data is displayed in the right frame and PDF is displayed in a new window

In **User data** you can change your password and e-mail address and the language of the patentGate application.

Changes are confirmed with **Save**.

6.3. Logout



This button closes your **patentGate** session. The login screen appears again.